KPMG Peat Marwick

LIBRARY SERVICES BRANCH

INTER-LIBRARY LOAN NETWORK STUDY

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Executive Summary

Scope and Objectives of the Study

On May 12, 1988, the Minister of Tourism, Recreation and Culture released *"British Columbia's Public Libraries: A New Approach"*, the final report of the Task Force on Public Libraries.

One of the report's recommendations was that a study be conducted to examine the options and costs of a Province-wide information and inter-library loan telecommunications network linking all public libraries. To this end, the Library Services Branch (LSB) in Victoria engaged the services of Peat Marwick to complete an inter-library loan network study and make recommendations.

The **scope** of the study was limited to public libraries in British Columbia. Interfaces with major resource libraries, such as the University of British Columbia, were considered during the study to the extent that they participate in inter-library loans in the Province.

The principal **objectives** of the study are:

- To identify the needs of the public libraries for resource sharing and determine what options exist for an inter-library loan telecommunications network linking all public libraries and interfacing with other types of libraries or library networks.
- To determine the costs of the most viable options.
- To assist decision makers in selecting the best option which also has the support of public libraries in the Province.

Study Approach

A staged approach was taken for this study. This consisted of establishing an Advisory Committee with one representative each from the Greater Vancouver Library Federation, University of British Columbia Library, Library Services Branch, Association of B.C. Public Library Directors and the B.C. Library Association.

A mail survey of all public libraries was conducted addressing information and inter-library loan network issues. Libraries were asked to provide their monthly inter-library loan (ILL) statistics on volumes of items loaned and borrowed, separated by types of material, their current systems including hardware, software and telecommunications and comments on the use of bibliographic utilities.

Personal interviews were conducted with representatives from 23 libraries around the Province to supplement the mail survey. A summary of problems with the current system was prepared and their information requirements identified. These requirements were matched with available inter-library loan network models in North America to determine the best fit. A recommendation was then prepared for endorsement by the Advisory Committee.

Major Issues

During the course of our review we identified a number of problems with the way the system functions at the moment. The key issues we identified may be summarized as follows:

- Because there is no standard procedure in the Province for inter-library loans, there are diverse labour intensive and inefficient systems in place.
- Because of lack of telecommunications in many libraries and reliance on mail, inquiry response time is slow and turnaround time for materials is often one month or longer.
- Because there is a lack of coordination for ILL, libraries or regions have evolved diverse and uneven ILL systems.
- In the absence of a readily available catalogue source for materials available in close proximity to the requestor, time and money are wasted in seeking and obtaining material from distant sources.
- There is a lack of training support which results in a lack of ILL expertise in some libraries.
- Because two out of the three university libraries charge for inter-library loans, time and effort is spent by some libraries finding non-charging sources, often out of Province.
- Time and effort is wasted at lending libraries due to a lack of training in the formulation of ILL requests at some borrowing libraries.

- Because many libraries have insufficient capacity or inadequate systems support, they are unable to provide or gain easy access to automated catalogues for ILL purposes.

- Because of varying search protocols in existing in-house systems, their use for ILL is inefficient and time consuming.

Inter-library Loan Conceptual Framework

Major ILL Requirements

The conceptual framework for the implementation of an inter-library loan telecommunications network in B.C. public libraries addresses structural and administrative issues to the extent that they impinge upon the network solution and provide a perspective for the implementation of improved technology.

The new ILL network will require all libraries to use the same ILL protocol. All libraries will be provided with the same means to complete initial searches, with the LSB providing a secondary level of service. This second level of service will consist of an extended role which includes the development, promotion and coordination of ILL policies, procedures and standards and the provision of clearinghouse services.

New technology will be employed to meet needs for:

- verification
- location of items
- sending / receiving requests
- filling requests

Available ILL Models

There are seven available models for a new inter-library loan telecommunications network. Each model offers a different type of technology or a variation in the way items are located. Each model also requires a different level of participation on the part of local libraries. The seven models are:

1. Use of Envoy for messaging within the conceptual framework described above.

2. Same as model 1 plus the introduction of a circle structure for libraries within a region which would borrow from one another first.

3. Use of a bibliographic utility such as Utlas or WLN for verification and messaging, with libraries within a region borrowing from one another first.

4. Use of Envoy for messaging and introduction of a circle structure; direct dial-in access to library databases; use of a CD-ROM union catalogue. Direct dial-in access to all public library databases in the Province.

5. Direct dial-in access to all public library data bases in the Province.

6. Use of telefax for messaging and document delivery within the conceptual framework described above.

7. Linked systems based on the Irving network model which entails the development of a computerized front-end for a single Province-wide ILL protocol for all users.

Summary of Conclusions

Recommendation 1

The role of the LSB should be enhanced to include:

- Development, promotion and coordination of ILL policies, procedures and standards.
- Providing the public with information about the availability of ILL.
- Establishing Province-wide levels of service to be provided to the public.
- Establishing a Province-wide delivery system for materials.
- Training of library personnel in ILL policies, procedures and standards.
- Providing clearinghouse services for ILL requests.
- Access to other specific electronic databases in the Province.
- Access to national level databases for verification and. where desired by the patron, location of materials.

Recommendation 2

The following staff should be hired to provide enhanced LSB service described above:

- One position for ILL project management and the development of policies and procedures.
- Three FTEs in the LSB regional offices for extended service and regional coordination.

Recommendation 3

The new ILL network should accommodate the principle of regional borrowing, i.e. that borrowing will to take place within a region within the Province first. This regional borrowing will include other types of libraries in the region, usually the local community college.

Recommendation 4

Only those libraries doing a significant volume of inter-library loans should be included in the new network. For the purposes of this report, this is defined as 200 items borrowed per year, as found in the 1987 Provincial statistics. There are 47 libraries with this volume, plus the 3 LSB regional offices, for a total of 50.

Recommendation 5

Model 4 should be selected as the preferred approach for the Province. This involves:

- Use of Envoy for messaging
- Introduction of a circle structure
- Direct dial-in access to library databases and
- Use of a CD-ROM union catalogue

The main reasons for this are as follows:

- This option offers maximum operational advantage over the other available options in supporting Recommendations 1 to 4 above.
- It positions the Province to take full advantage of current and emerging technology over the next 5 years.
- It provides the most effective and efficient ILL procedures by enabling a large number of specific locations to access information on an estimated

1.4 million unique titles, to use Electronic Mail and to obtain on-line verification.

On this basis the set up and annual operational costs are as follows:

• Set up costs for CD-ROM, Envoy & dial-in	$341,060
• Annual operational costs	$485,540

The model should be implemented in four phases:

- Phase 1 - Establish enhanced LSB service.
- Phase 2 - Implement Envoy with circle structure.
- Phase 3 - Implement direct dial-in access.
- Phase 4 - Implement CD-ROM union catalogue.